Legal Services Corporation

TIG Online Milestone Reporting System

End User Instructions

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TIG Online Milestone Reporting

The Basics:

URL Address:
http://www.lscopp.com/techsite/milestones/registration.asp

To Login to the TIG Online Milestone Reporting Database:

1. Enter your grantee number (not your TIG number) into the "Grantee Number (RNO)" space.
2. Enter your basic field grant password into the "Password" field.
3. Click "submit" to Login to the system.
4. The screen will read "Welcome to the Online Reporting System"
5. Select a grant by clicking on the "Proceed" button located under the grant description.

To Logout of the TIG Online Milestone Reporting Database:

1. Click "Logout" at the top of the navigational bar on the left side of the screen.

Adding and Removing Users:

To Add/Remove Users: A grantee may wish to create staff with reporting responsibilities on a specific grant. It is best to do this without sharing the password the grantee uses for entering information on a basic field grant. The Online Milestone Reporting system provides a way for grantees to create additional passwords that can be assigned to other staff for reporting purposes. These passwords can only be created by the TIG grantee and can be revoked at any time.

1. Login to the TIG Online Milestone Reporting system.
2. Identify desired grant.
3. Click the "Add/Remove Users" icon located under the "Proceed" button for that grant.
4. In the field provided, enter a password to be associated with your grantee number. Click on the "Add" icon to validate that password. You may add as many passwords as you like.

To Remove a User:

1. Login to the TIG Online Milestone Reporting system.
2. Identify desired grant.
3. Click the "Add/Remove Users" icon located under the "Proceed" button for that grant.
4. Click on the delete icon associated with the user you wish to delete.

Creating Reports

To View Milestone Schedule: A milestone schedule is a summary of your payment schedule – it shows the payment increments, each amount, and the number of milestones associated with each payment. This view is for informational purposes only – you cannot modify this schedule in any way.

1. Login to the TIG Online Milestone Reporting system.
2. Identify the desired grant, and click on "Proceed" to select.
3. Click "View Milestone Schedule". A new window appears which displays the schedule. You must manually close that window to return to the main grant menu.

Making a Quarterly Report: A quarterly report is an update to LSC on the progress of your grant. It does not request a payment. You are not required to address each milestone as you are in a payment request. This should be a general overview – a snapshot of where the project is and what has been accomplished in the last three months. Quarterly Reports are due the month following the third month of the quarter. Please calculate quarterly reports based on the date your grant was started. For example – if you started in January – your quarterly reports are due on April 1 for the first quarter, July 1 for the second quarter, October 1 for the third quarter and January 1 for the fourth quarter. You must still make a quarterly report, even if you have submitted a payment request in the same month.

1. Login to the TIG Online Milestone Reporting system.
2. Select desired grant by clicking "Proceed" button located under the grant description.
3. Click "Add/View Quarterly Reports" to view and/or enter a new quarterly report.
4. In the Period field – Enter in the Month(s) and Year to be reported on. For example – Mar 2003 – May 2003 or March '03-May '03.
5. In the Summary field – enter a brief narrative description of the progress that has occurred on the grant during the period indicated.
6. When you are finished, click "Save Report". That will automatically generate an email to your LSC staff contact indicating that a report has been submitted.

View Quarterly Reports: Once you have added a quarterly report, it is saved to the website and you can always come back to review. You can modify your prior reports and when you click save the report will be re-submitted to LSC.

1. Login to the TIG Online Milestone Reporting system.
2. Select desired grant by clicking "Proceed" button located under the grant description.
3. Click "Add/View Quarterly Reports"

4. At the bottom of the next screen will be a list of the quarterly reports already submitted. Click on the title to select a report. Click on the Edit button to edit your report. Click Add New to add a new report.

Making a Payment Request: A payment request asserts that your project has successfully completed each milestone associated with that payment. The Online Milestone Reporting system provides you with an online method of documenting the successful completion of each milestone according to the instructions provided by LSC staff. Each milestone will have a set of instructions written by LSC staff that should indicate how a milestone can be documented to show successful completion. For example: if the milestone reads "Convene a Stakeholder Committee", the instruction may read "Please submit a copy of the Stakeholder Committee roster, including name, title, and name of organization for each member." Providing that document is what is required to certify that you have successfully completed that milestone.

1. Login to the TIG Online Milestone Reporting system.
2. Select desired grant by clicking "Proceed" button located under the grant description
3. Click "Make a Payment Request".
4. Click the payment number in which you wish to request payment and/or report on milestones. (No reports are necessary for initial payments – they are generated automatically after we have received your signed grant award letter.)
5. The next screen will show you a list of the milestones associated with that payment. Under each milestone is the instruction for documenting the successful completion of that milestone. Under the instruction is a field entitled "Grantee Response". Under the Grantee Response field is an "Upload File" icon. You may enter in a narrative description which responds to the milestone instruction in the Grantee Response field and/or you can upload a file to the website. Taking the prior example – you could type in the Stakeholder Committee Roster into the Grantee Response field or you could upload your copy of the roster using the upload file icon.
6. To Upload A File – click on the Upload File icon. A small dialogue box appears – you can use the browse button to locate the document you wish to upload. Once you have located the file, click on the Upload File button. You done! When responding to milestones by uploading files – it is necessary to indicate in the Grantee Response field that you have uploaded a file. For example you could type in "Uploaded Committee Roster as Word File entitled "Utopia Statewide Website Stakeholder Committee Roster.doc".
7. Once you have completed entering information - click "Save Report" to save added/updated information. Your data will be saved to the website – you can come back and edit the information as often as you want. No data will be

submitted to LSC until you place a checkmark in the Request Payment check box in the bottom left hand corner. Once you check Request Payment you will not be able to edit your report.

Reference Material/Announcements: Occasionally TIG staff will need to make announcements to the field at large – this link will be activated when an announcement needs to be distributed.

1. Login to the TIG Online Milestone Reporting system.
2. Select desired grant by clicking “Proceed” button located under the grant description
3. Click “Reference Materials/Announcements” when activated.

How to Update Contact Information: There are two types of contact information we track on TIG grants – the Executive Director of the program awarded the grant and the Technical or Program contact for the grant. Both items can be modified from this screen.

1. Login to the TIG Online Milestone Reporting system.
2. Select desired grant by clicking “Proceed” button located under the grant description
3. Click on “Update Contact Information” and make any changes to the information displayed. When finished, click on the Save/Update button.

Contact Us:

1. Login to the TIG Online Milestone Reporting system.
2. Select desired grant by clicking “Proceed” button located under the grant description
3. Click on “Contact Us”, the system will automatically generate an email message directed to the LSC staff contact assigned to this grant. Simply enter in the message and click Send.